



INNOVATIVE  
MEDICINES  
CANADA

# PROVIDING HOPE FOR CANADIANS: EARLY ACCESS TO MEDICINES THROUGH CLINICAL TRIALS

## RESEARCH NOTE

APRIL 2024



## EXECUTIVE SUMMARY

In many areas of high unmet patient need, early access to new medicines through clinical trials are the only option for Canadian patients. There are over 3,000 ongoing clinical trials in Canada which provide significant value to patients. Early access to innovative treatments improves health outcomes, increases quality of life, and gives hope to patients and their loved ones. Clinical trials also provide value to our healthcare system, research ecosystem, and economy.

The innovative pharmaceutical industry contributed almost \$16 billion in value to the Canadian economy in 2020 and supported almost 107,000 high-value jobs.<sup>1</sup> The industry also proudly supports the majority of clinical trials initiated in Canada:



**Industry sponsored two-thirds of all clinical trials (between 63% and 75%) initiated in Canada in the last 4 years** (see Charts 1 and 2).

**Approximately 30% of total clinical trials initiated were for oncology treatments, and industry sponsored two-thirds of them** (see Chart 3).

**Clinical trials for drugs for rare diseases accounted for 27% of total trials initiated in 2023, and industry sponsored 73% of them** (see Chart 4).

The COVID-19 pandemic led to a surge in clinical trial activity in 2021 (+27% compared to 2020), but this was followed by a decline in the number of trials initiated in Canada in both 2022 (-23% compared to 2021) and 2023 (-19% compared to 2022). This highlights a need to urgently address existing patient access gaps<sup>2</sup> to position Canada as a more attractive destination for future pharmaceutical R&D and clinical trial launches.

<sup>1</sup> Statistics Canada, 2023. [The Canadian Research and Development Pharmaceutical Sector, 2020](#).

<sup>2</sup> Conference Board of Canada, January 2024. [Access and Time to Patient: Prescription Drugs in Canada](#)

## KEY FINDINGS

**The innovative pharmaceutical industry is a leader in clinical trials initiation in Canada, especially in trials for drugs for rare diseases and for oncology medicines.**

- Industry sponsored between 63% and 75% of clinical trials initiated every quarter since January 2020. (Chart 1 and Chart 2)
- Oncology trials accounted for approximately 30% of total clinical trials initiated, and industry sponsored around two-thirds of them. (Chart 3)
- Clinical trials for drugs for rare diseases accounted for 27% of total trials initiated in 2023, and industry sponsored 73% of them. (Chart 4)

**Approximately 1.7 million patients were planned to be enrolled in ongoing clinical trials across Canada.<sup>3</sup>**

**The number of clinical trials initiated in Canada in 2023 declined by -19% compared to 2022 and by -37% compared to 2021. (Chart 1)**

- Comparatively, the number of trials initiated worldwide in 2023 declined by -5% compared to 2022 and by -10% compared to 2021.
- The number of trials initiated in North America in 2023 declined by -4% compared to 2022 and by -19% compared to 2021.

**There were over 3,200 ongoing clinical trials in Canada in January 2024. (Chart 5)**

- Clinical trial activity occurred in all provinces and many trials had sites in multiple provinces:
  - 69% of all ongoing trials in Canada had sites in Ontario;
  - 45% had sites in Quebec;
  - 32% had sites in Alberta;
  - 25% had sites in British Columbia;
  - 18% had sites in the Atlantic provinces;
  - 14% had sites in Manitoba or Saskatchewan.

**Canada has the highest number of clinical trials per capita among the G7 countries. (Chart 6)**

**8 of the top 10 sponsors for ongoing clinical trials in Canada were IMC members.<sup>4</sup>**

**Oncology was the main therapeutic area and accounted for 35% of ongoing trials, followed by trials for central nervous system medicines (14%), cardiovascular medicines (7%), and infectious disease medicines (6%). (Chart 7)**

**Most of the clinical trials initiated in Canada since 2020 were multinational trials, and industry sponsored most multinational trials. (Chart 8)**

- Approximately 90% of the multinational trials were industry sponsored.
- Comparatively, the majority of trials with no sites outside Canada were mostly institution or government sponsored (almost 80% of trials initiated every year since 2020).

<sup>3</sup> GlobalData, 2024. Clinical Trials Database. Data extracted January 22, 2024. Subjects could be enrolled in multiple trials at the same time. Number of subjects enrolled is subject to data availability due to confidentiality; approximately 500,000 subjects were confirmed enrolled in ongoing clinical trials.

<sup>4</sup> GlobalData, 2024. Includes interventional trials with ongoing status on January 9, 2024. Excludes observational and behavioral studies.

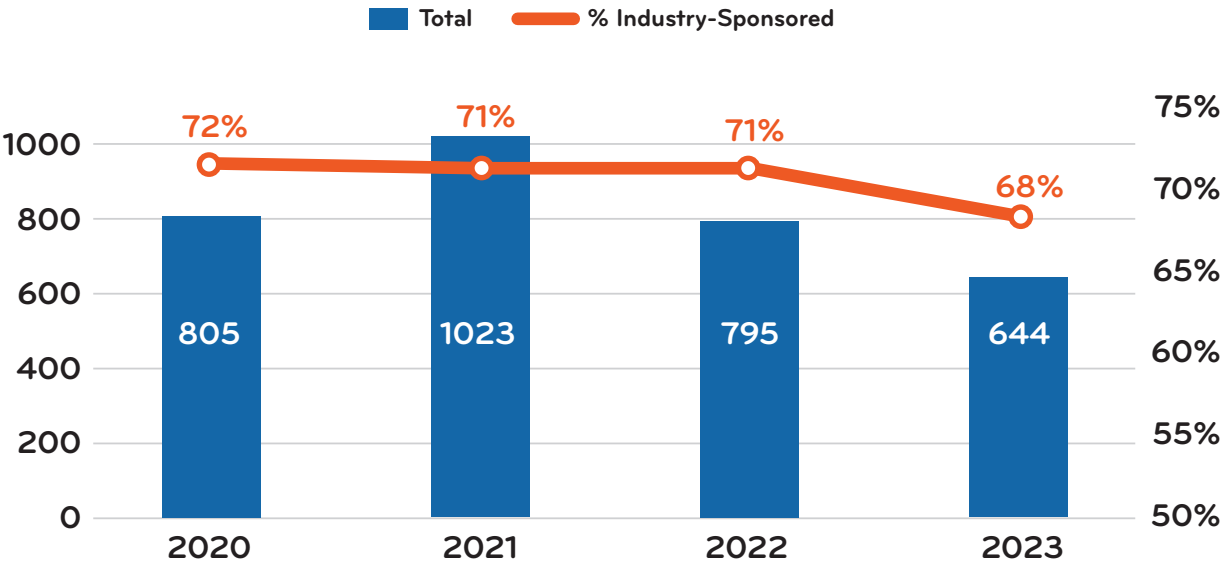
## CONCLUSION

The innovative pharmaceutical industry makes a significant contribution to the total health of Canada by sponsoring the majority of clinical trials which benefit nearly two million Canadians each year. However, current challenges with drug access and availability in Canada when compared to other peer nations can act as a disincentive for investment, which has negative consequences for patients, our healthcare system, and our economy.

**By improving access to innovative medicines, Canada can continue to be a global leader in clinical trial activity.**

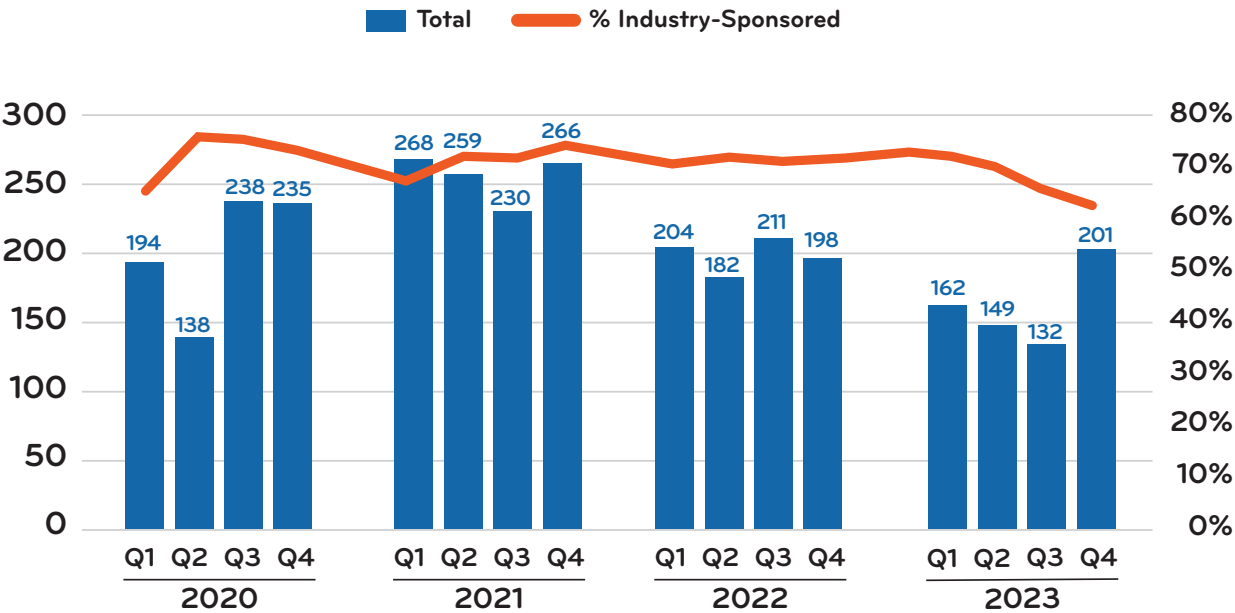
DATA CHARTS

Chart 1: Clinical Trials Initiated in Canada, 2020 - 2023



Source: GlobalData, January 2024. Interventional clinical trials initiated January 1, 2020 to December 31, 2023. Excludes observational and behavioral studies.

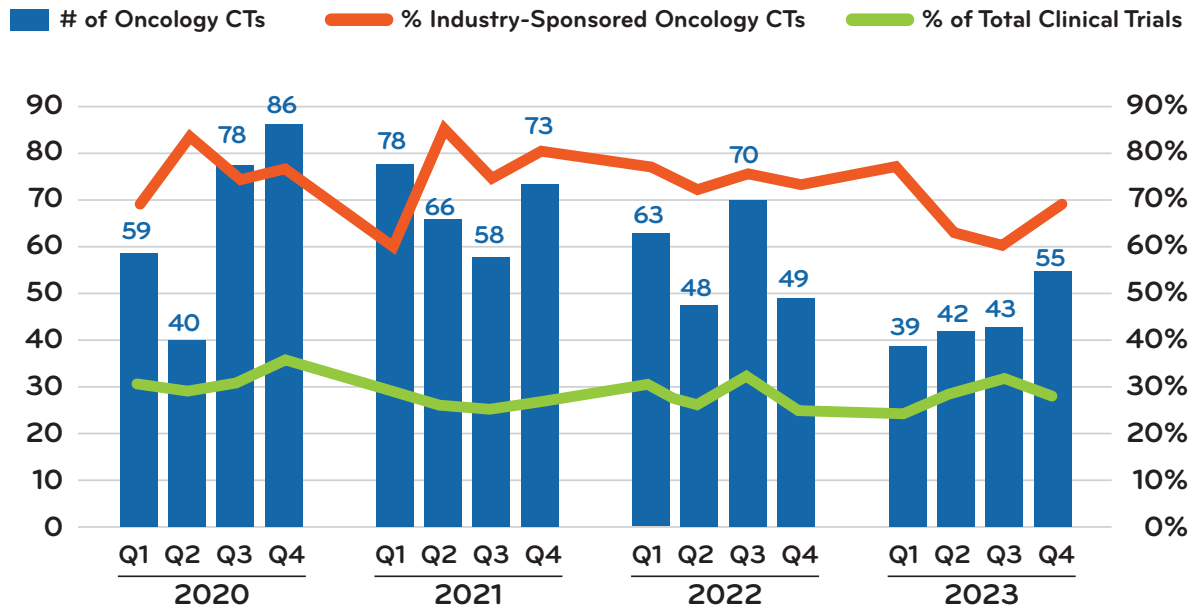
Chart 2: Clinical Trials Initiated in Canada, 2020Q1 - 2023Q4



Source: GlobalData, January 2024. Interventional clinical trials initiated January 1, 2020 to December 31, 2023. Excludes observational and behavioral studies.

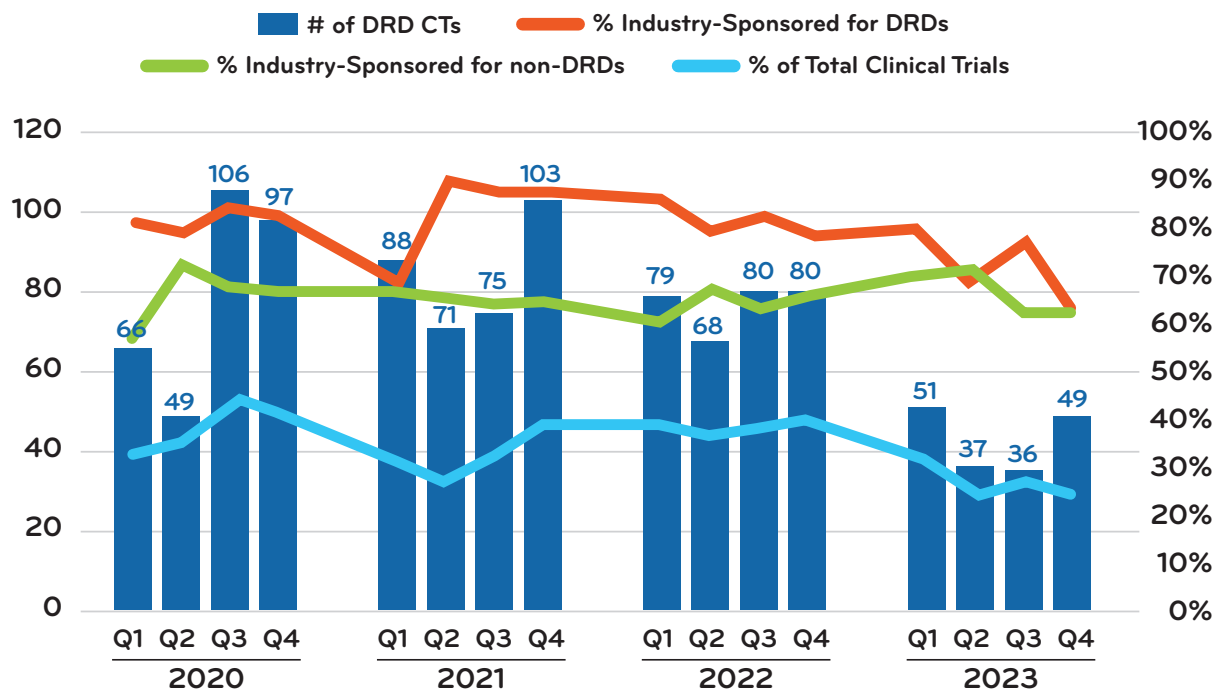


## Chart 3: Oncology Clinical Trials Initiated in Canada



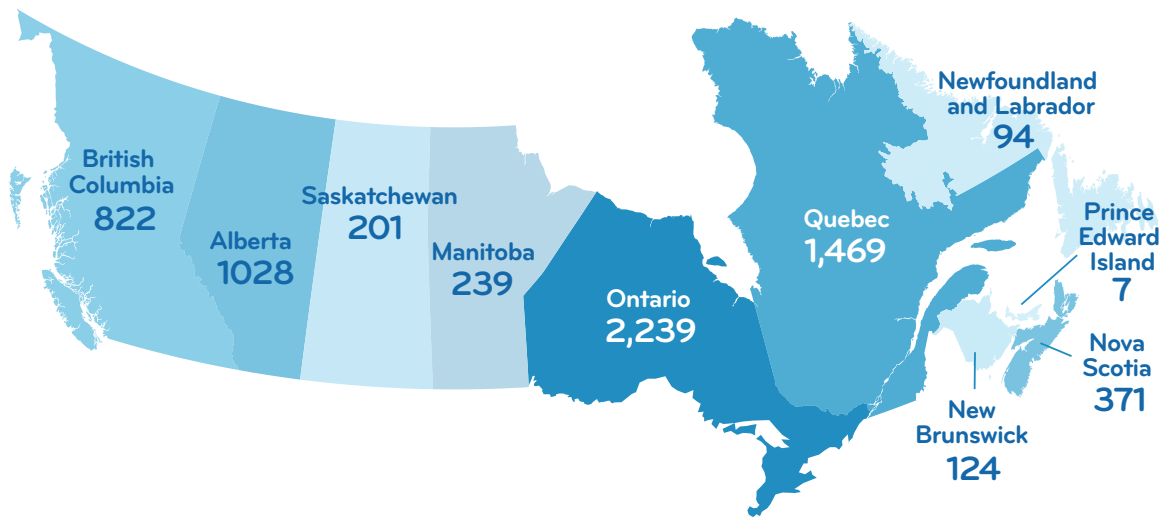
Source: GlobalData, January 2024. Interventional clinical trials initiated January 1, 2020 to December 31, 2023. Excludes observational and behavioral studies.

## Chart 4: Clinical Trials for Rare Diseases Initiated in Canada



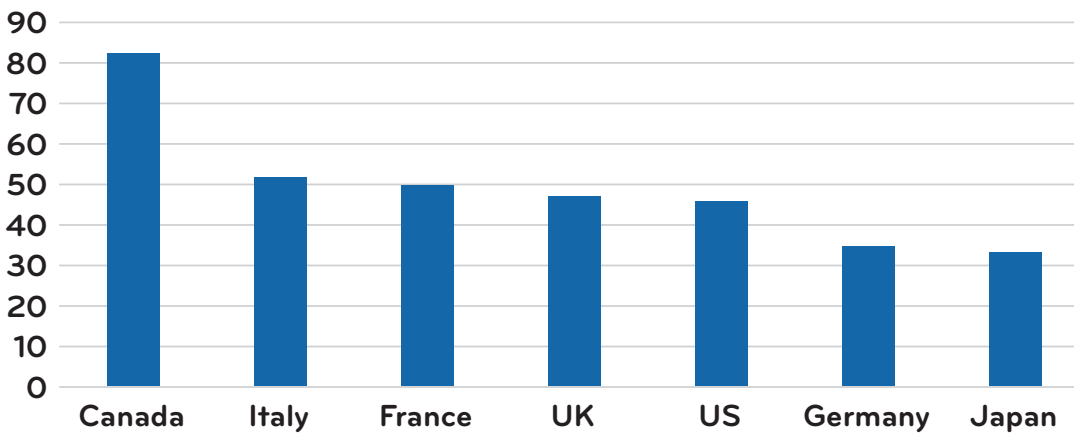
Source: GlobalData, January 2024. Interventional clinical trials initiated January 1, 2020 to December 31, 2023. Excludes observational and behavioral studies.

Chart 5: Ongoing Clinical Trials, by Province, January 2024



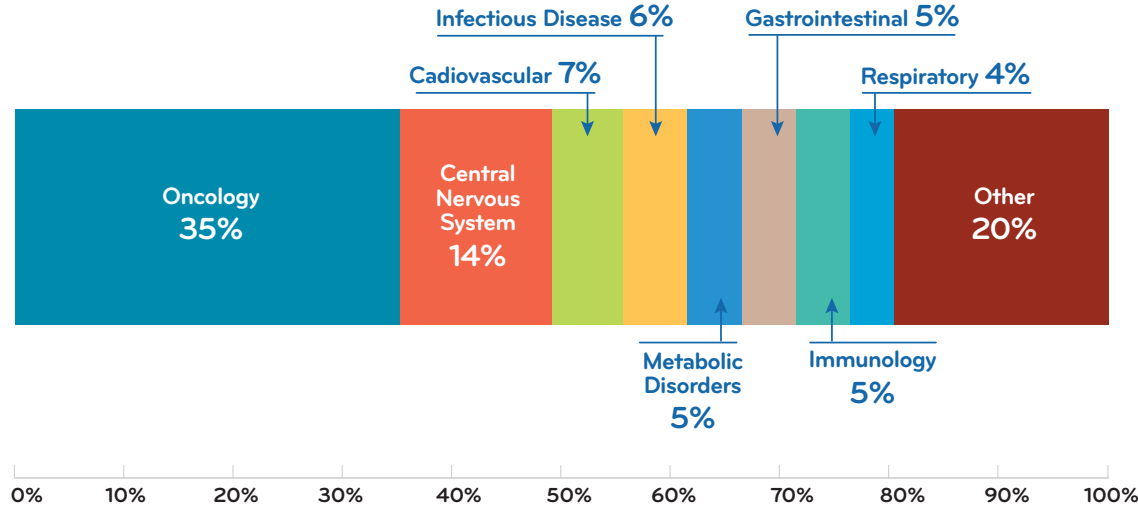
Source: GlobalData, 2024. Total ongoing trials = 3,233. Provincial totals add up to more than Canadian total due to trials having multiple sites in multiple provinces. 346 trials had no specified location and are not included in this chart. Excludes observational and behavioral studies.

Chart 6: Ongoing Clinical Trials per Million Population, G7 Countries



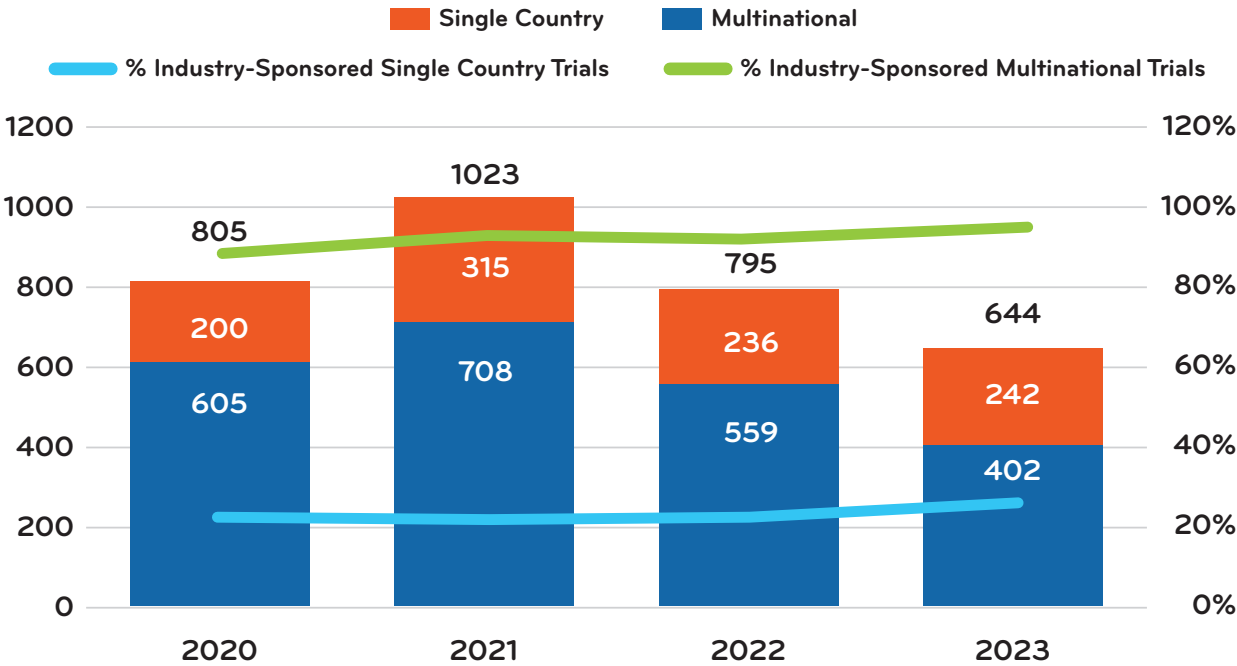
Source: GlobalData, 2024. Includes interventional trials with ongoing status on January 9, 2024. Excludes observational and behavioral studies. World Bank Databank, 2024. Population estimates 2023. Retrieved January 9, 2024. Calculations by IMC.

Chart 7: Ongoing Clinical Trials by Therapeutic Area



Source: GlobalData, 2024. Clinical trials with ongoing status on January 9, 2024. Excludes observational and behavioral studies.

Chart 8: Multinational & Single Country Clinical Trials Initiated in Canada



Source: GlobalData, January 2024. Interventional clinical trials initiated January 1, 2020 to December 31, 2023. Excludes observational and behavioral studies.





INNOVATIVE  
MEDICINES  
CANADA



MÉDICAMENTS  
NOVATEURS  
CANADA

[innovativemedicines.ca](http://innovativemedicines.ca)